

# Workday Projects Manager Course

June 2020  
Presented by  
Workday Change Management Team

See Management Hierarchy Report

# Agenda

1. Introductions
2. Confidential Information
3. View Project Hierarchy
4. Create Project and Assign Resources
5. Edit Project
6. Entering Projects on a timesheet
7. Kronos Employee Project Entry
8. Reports
9. Next Steps and Important Dates
10. Demo/Hands On Practice
11. Appendix – Other Time Entry Methods

# Access to Confidential Information

WDDS Role assignees may need to access confidential and sensitive information. You may only share information with authorized employees.

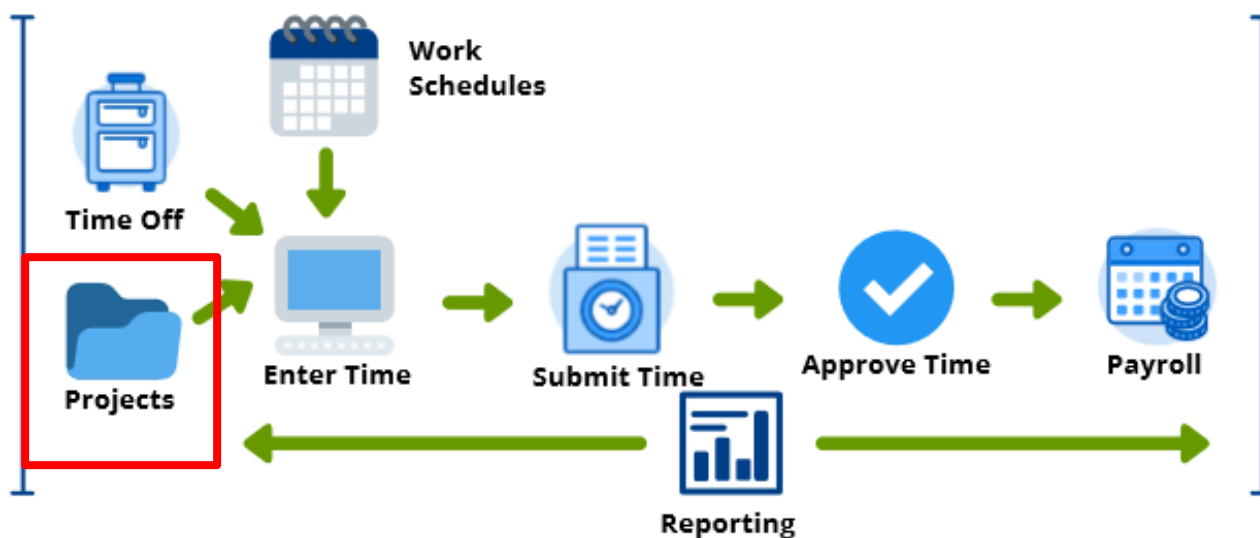
# Access to Confidential Information

## **Confidentiality of Records**

Workday system access is provided for official business of the City of Dallas. Any other use of this information may violate one of the following: AD 2-33 E-Mail and Internet Policy; Information Systems Acceptable Use; Personnel Rule Sec. 34-36 Rules of Conduct; Federal Privacy Act of 1974; Computer Fraud and Abuse Act of 1986; Computer Privacy Act of 1986; Computer Security Act 1987; Freedom of Information Act, 5 U.S.C. Sec 552; Electronic Freedom of Information Act Amendments of 1996; Telecommunications Act of 1996; Consumer Internet Privacy Protection Act of 1999. Unauthorized distribution, reproduction, modification or deletion of any, employee information outside the intended and approved use is strictly prohibited. Illegal access or misuse of this account is punishable up to including termination. Further, the City of Dallas computer systems are for the use of authorized users only. If one is suspected of unauthorized activities, Human Resources (HR) may monitor and record any activities associated with account in use. Anyone using the system expressly consents to such monitoring. It is understood that this is an individual access account and may not be given or shared with anyone, unless the account was set-up to be and controlled for that purpose.



## Overview of Time Tracking



# Project Hierarchy



# View Project Hierarchy

## View Project Hierarchy

Project Hierarchy \*

Search



← Level 2 Hierarchies

☒ Building Services - Projects

☐ City Attorney's Office - Projects

☐ City Auditor's Office - Projects

☐ City Controller's Office - Projects

☐ City Manager's Office - Projects

☐ Code Compliance - Projects

☐ Convention & Event Services - Projects

☐ Court & Detention Services - Projects

☐ Dallas Animal Services - Projects

Each Department has its own Project Hierarchy

City of Dallas is the Top Level

All departments are Level 2 Hierarchies

Projects Manager role assignees see and update Projects for their department

Enter Navigate Project Hierarchy in the Search Bar

Select your department

# Project Hierarchy

## ← View Project Hierarchy

Building Services - Projects [Actions](#)

Project Hierarchy Name	Building Services - Projects
ID	BSD_0001
Include Project Hierarchy ID in Name	No
Enable as Optional Hierarchy	No
Status	Approved
Inactive	No
Description	(empty)
Parent	<a href="#">City Of Dallas</a>
Reporting Currency	USD
Resource Plan (Assigned)	<a href="#">Resource Plan for Hierarchy:Building Services - Projects</a>

[View Project Resources](#)

Resource Plan Line    Assigned Roles    Worktag Rule Configuration

Project Resource

BSD\_0001

Resource Plan Line

Project Role    [Project Resource](#)

The Project Resources tells Workday which employees are eligible to utilize the Project on their timesheet.

Each Department's Resource Plan is assigned to the supervisory organizations for the department

All of the department's projects are available to all of the department's employees, based on their sup org

The Department's Project Resource Plan is automatically assigned to the department's projects.



# Viewing Individual Projects



City of Dallas

# View Project

- View Project

Review information on an existing project

Use Hierarchy to search or enter part of name or code in the search bar or enter View Project

Only searches one project at a time

# Viewing Projects

← OVT3-10 Other Category Not Found
Actions

Owner (empty)
Percent Complete 0%
Status (empty)

Start Date 01/01/2020
End Date (empty)

Overview
Resources
Project Plan
Financials

Summary
Details
Role Assignment
Process History

Project Summary
Project Name Other Category Not Found
Start Date 01/01/2020
End Date (empty)
Status (empty)
Owner (empty)
Description (empty)

Reference Information
Project Hierarchy [Dallas Fire-Rescue - Projects](#)
Optional Project Hierarchies (empty)
Project ID OVT3-10
Include Project ID in Name Yes
Inactive No
Billable No

**View Project Information** – Name, Start Date, Date  
Description, Project ID  
Click Resources to view/edit Resource Plan

# Creating New Projects

# Creating New Projects


## Create Project

Use this task to create your project. Specify the Project Hierarchy and the templates to copy.

### Select a Project Hierarchy

Project Hierarchy \*

Resource Plan (Inherited)




- By Manager >
- Project Hierarchy >
- Top Level Project Hierarchies >
- Level 2 Hierarchies >**

- Enter **Create Project** in the search bar
- Select Level 2 Hierarchies
- Select your department
- Note: you will only be able to set up the Project for your department
- Citywide projects will be set up by the Office of Budget

### Select a Project Hierarchy

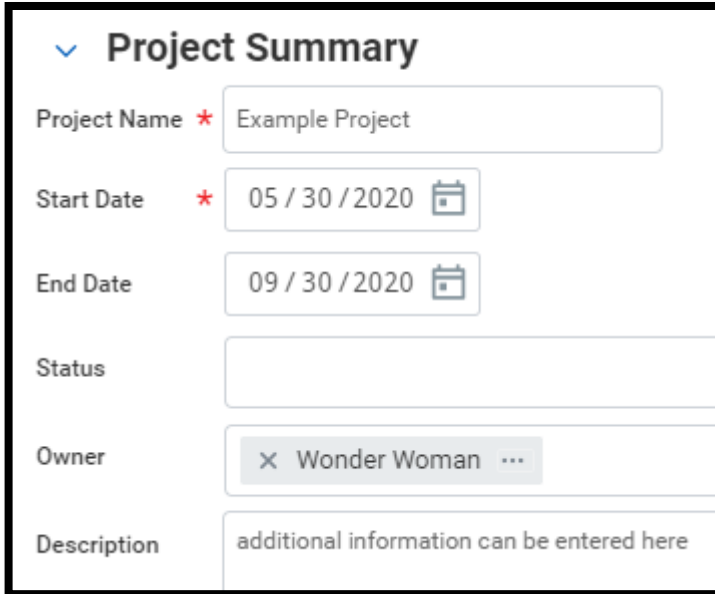
Project Hierarchy \*

Resource Plan (Inherited)



- ← Level 2 Hierarchies
- ☒ **DWU DALLAS WATER UTILITIES**

# Creating New Projects



The screenshot shows a 'Project Summary' form with the following fields:

- Project Name** (required, marked with a red asterisk): A text input field containing 'Example Project'.
- Start Date** (required, marked with a red asterisk): A date picker showing '05 / 30 / 2020'.
- End Date**: A date picker showing '09 / 30 / 2020'.
- Status**: An empty text input field.
- Owner**: A dropdown menu showing 'Wonder Woman' with a close button (X) and a more options button (three dots).
- Description**: A text area with the placeholder text 'additional information can be entered here'.

- On the left side of the screen for the blank project, enter the required fields plus optional information relevant to your department's processes

**Project Name** – short description of project – this will appear when the employee is selecting projects

**Start Date** – required. Projects can be set up in advance using start date. If the project's start date falls in the middle of a pay period, the project will only be available to select on those days that fall within the start and end dates.

**End Date** – last date the Project will be available to use on timesheets.

**Owner** – will prepopulate with the Projects Manager's name, can be assigned to anyone in the department, if needed

**Description** – longer information may be added regarding the Project

# Creating New Projects

▼

Reference Information

Project Hierarchy

\* DWU DALLAS WATER UTILITIES

Optional Project Hierarchies

Project ID

DWU\_EX\_1001

Include Project ID in Name

☒

**Project ID** – enter the code or “behind the scenes” identification number for the project. This must be a unique value. Match this code to the Advantage Program Code, as needed.

**Include Project ID in Name** when checked the Project ID will be displayed when employees are entering projects on their timesheet. When not checked, only the name will be displayed. Click **Submit**

**Check your timesheet to ensure new project is available on the desired dates.**

## Projects Date Information

If the project's start or end date falls in the middle of a pay period, the project will only be available to select on those days that fall within the start and end dates.

For the upcoming new fiscal year, departments can load the projects in August or September and their employees will not see the values to use on their timesheet until the start date.

Contact Office of Budget – Grants Management Team to coordinate Project load via spreadsheet



# Updating Resource Plan for Project

## Create Resource Plan for Project

Use this task to create a resource plan for your project. Select an available project for which you want to create a resource plan.

Project \* ✕ OVT3-10 Other Category Not Found ... ⋮

Copy from Project Hierarchy ☒

Use this **OPTIONAL** task to update a resource plan for your project.

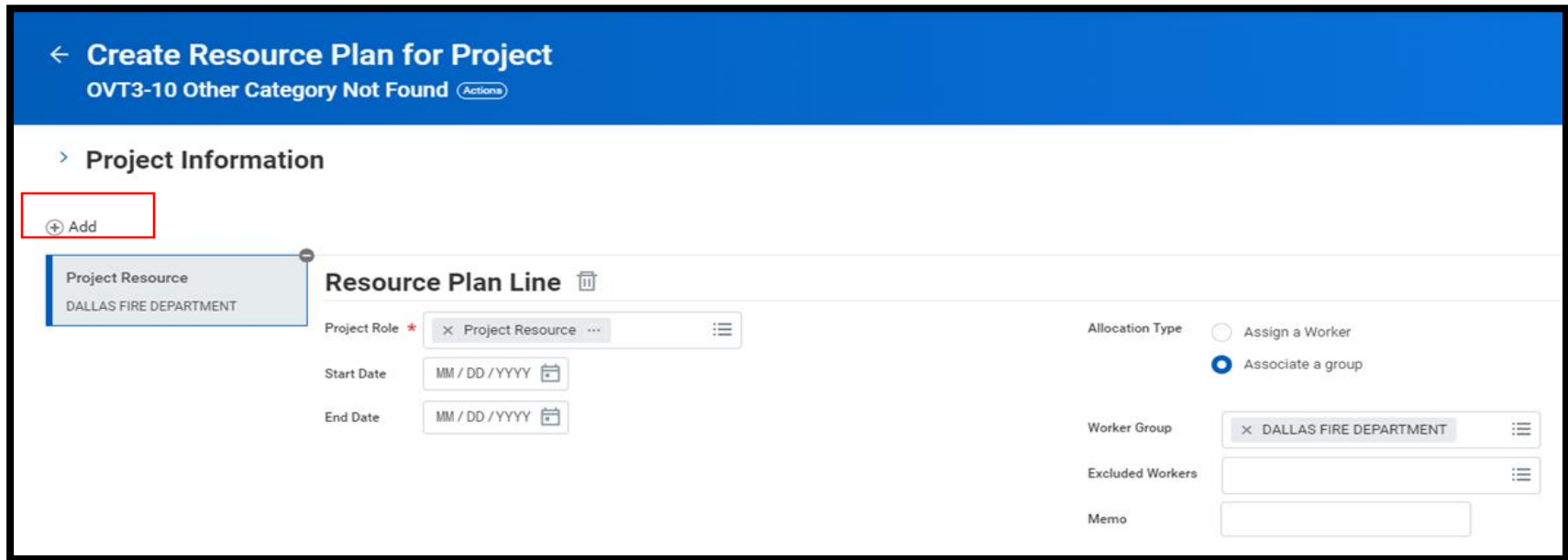
This task is only needed when more staff than just the department needs to be assigned.

Check the box to add to the existing Resource Plan. If the box is unchecked, you will not have any resources assigned.

The box should be checked to add Resources to a Project – in addition to the department resources.

If you need to add Resources to you Hierarchy (all projects for your department, contact the Projects Administrator via 1234 Ticket)

# Updating Resource Plan for Project



**Click Add**

**Enter Project Role** – Select Project Resource

Enter **Start/End Dates**, if needed.

These dates may be left blank – the project will have a start date.

**Allocation Type** – select **Associate a group**

**Worker Group** – select **Dynamic Resource Pool** or Assign a Worker

**Add Assigned Worker by Name**

Click **Submit**. After Submitting, the project will be available for use on timesheets on the start date established on the project.

# Updating Resource Plan for Project

← Create Resource Plan for Project

OVT3-10 Other Category Not Found [Actions](#)

> Project Information

⊕ Add

Click here to sort

Project Resource

Jeanne Chipperfield

Project Resource

DALLAS FIRE DEPARTMENT

Resource Plan Line

Project Role \* ✕ Project Resource ...

Allocation Type

☒ Assign a Worker
 ☐ Associate a group

Start Date

06 / 17 / 2020

End Date

MM / DD / YYYY

To Be Hired

☐

% Allocation

100

Estimated Hours

0

Memo

Worker

Resource Plan Line 1 item

⊕

Worker

⊖

✕ Jeanne Chipperfield ...

Click the + to add a worker. One name per row

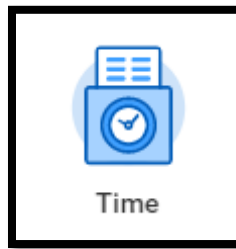


# Initial Project Data Load and Updates

# Initial Project Data Load

- Departments submitted lists of projects to load in January 2020
- Department Project Managers should review the projects that were set up when the new tenant is available beginning on June 22<sup>nd</sup>
- Citywide COVID and department-specific codes will be set up and ready to use beginning on June 22<sup>nd</sup>
- New projects may be added beginning on June 22<sup>nd</sup>
- Please establish your department's naming convention and process and communicate to your department's employees

# Enter Projects on a Timesheet





City of Dallas

# Enter Time for Worker



Time and  
Absence

## Tasks

Review Time

My Team's Schedule

Request Absence

Correct My Absence

Enter Time for Worker

Less (2)

## Enter Time for Worker

Worker \*

|



× Dare Devil ...

Date \*

05 / 18 / 2020





## Calendar

- By selecting the day  
(selection turns **blue** and opens a time block to enter your time)

## Enter Time

Captain Marvel [Actions](#)

Hours Worked	Absence	Overtime	Holiday	Total
0	0	0	0	0

[Today](#)
[<](#)
[>](#)

May 13 – 19, 2020

View

Week
▼

Wed 5/13 Hours: 0	Thu 5/14 Hours: 0	Fri 5/15 Hours: 0	Sat 5/16 Hours: 0	Sun 5/17 Hours: 0	Mon 5/18 Hours: 0	Tue 5/19 Hours: 0
						<div>Time Period End</div> <div>05/06/2020 - 05/19/2020</div>



# Enter Time

- By selecting the day  
(selection turns **blue** and opens a time block to enter your time)

## Enter Time

05/18/2020

Time Type \*

Hours \*

### Details

Comment

# Add a Project to a Time Sheet

## Enter Time

05/06/2020

Time Type \* COVID-19 COVID-19 Response

Hours \*

### Details

Additional Time Type  Additional Hours Worked

Comment

OK

Cancel

## ← Additional Time Type

☒ 28 DAY - Additional Hours (OVT3)

☐ Additional Hours Worked

☐ Hours Worked

☐ Temp Assgn Pay 1 rank - DFDU

☐ Temp Assgn Pay 2 rank - DFDU

☐ Temp Assgn Pay 3 rank - DFDU

☐ Temp Assgn Pay (OVT1) - Pay 1 Rank

☐ Temp Assgn Pay (OVT2) - Pay 2 Rank

☐ Temp Assgn Pay (OVT3) - Pay 3 Rank

☐ Training

Search

Distinguish  
between  
Scheduled  
Hours Worked  
and Additional  
Hours Worked

Multiple Project Codes can be entered on a single day. Project Codes cannot be used for time off (sick, vacation, AIL.)

Wed 5/6  
Hours: 10

### COVID-19 Response

2 Hours

☐ Not Submitted

### Regular Hours

8 Hours

☐ Not Submitted

# Additional Time Types

Civilian WD Time Entry	Civilian Kronos	DFR Sworn	DPD Sworn
Additional Hours Worked	Kronos - Overtime	28 Day Additional Hours (OVT3)	Earn Comp Time
Hours Worked	Hours Worked	Temp Assgn Pay 1 rank - DFDU	Additional Hours Worked
Training	Training	Temp Assgn Pay 2 rank - DFDU	Hours Worked
		Temp Assgn Pay 3 rank - DFDU	Training
		Temp Assign Pay (OVT1)- Pay 1 rank	
		Temp Assign Pay (OVT1)- Pay 2 rank	
		Temp Assign Pay (OVT1)- Pay 3 rank	

Use the Additional Time Type applicable to yourself or your employee's position

# Enter Time by Type

This option allows you to enter multiple time types to enter daily hours for each day to total your weekly hours. Select OK to return to the timesheet.

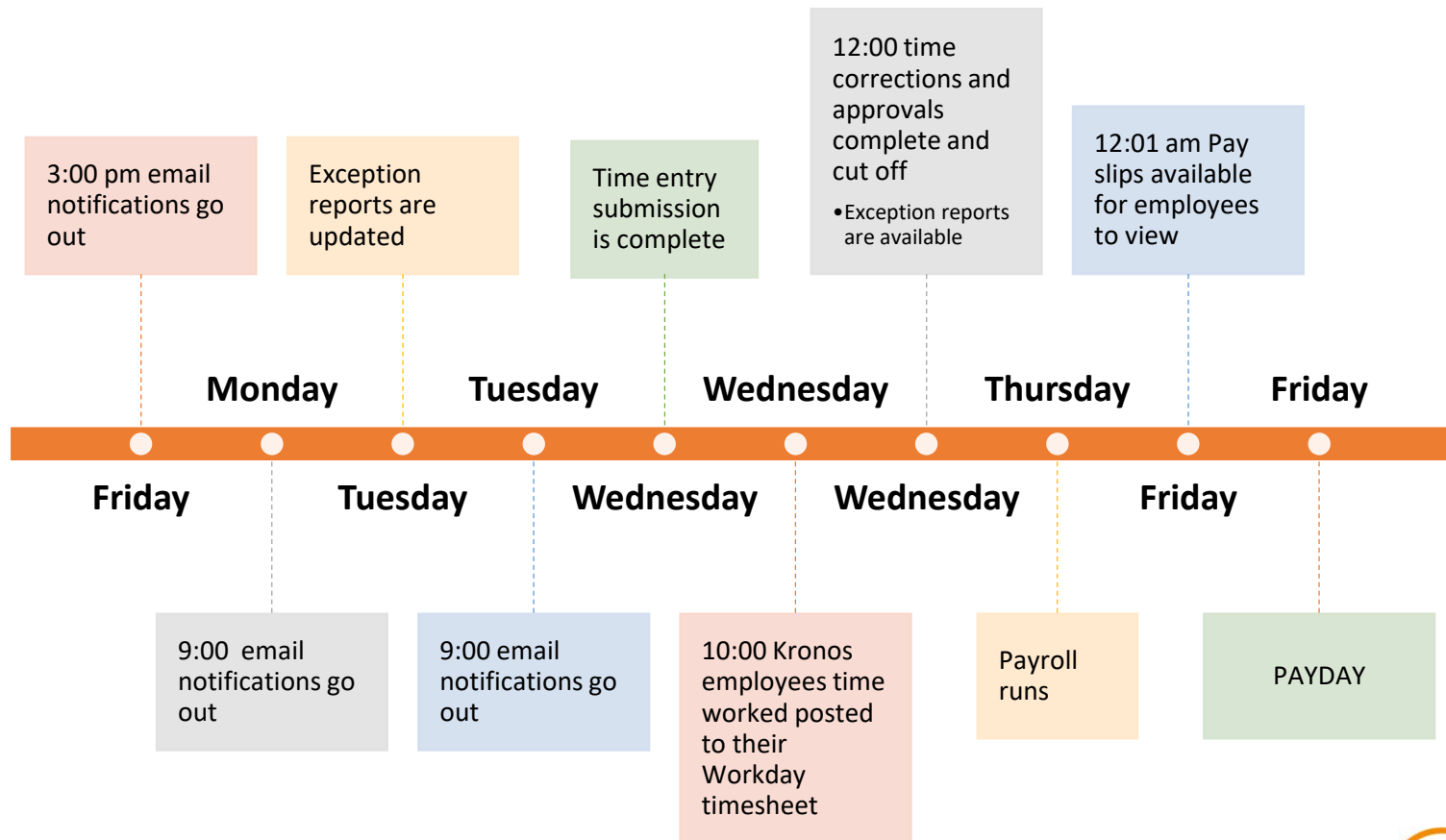
NOTE: Default Projects can be set to speed up time entry. This would be useful for employees who regularly enter project time.

4 items

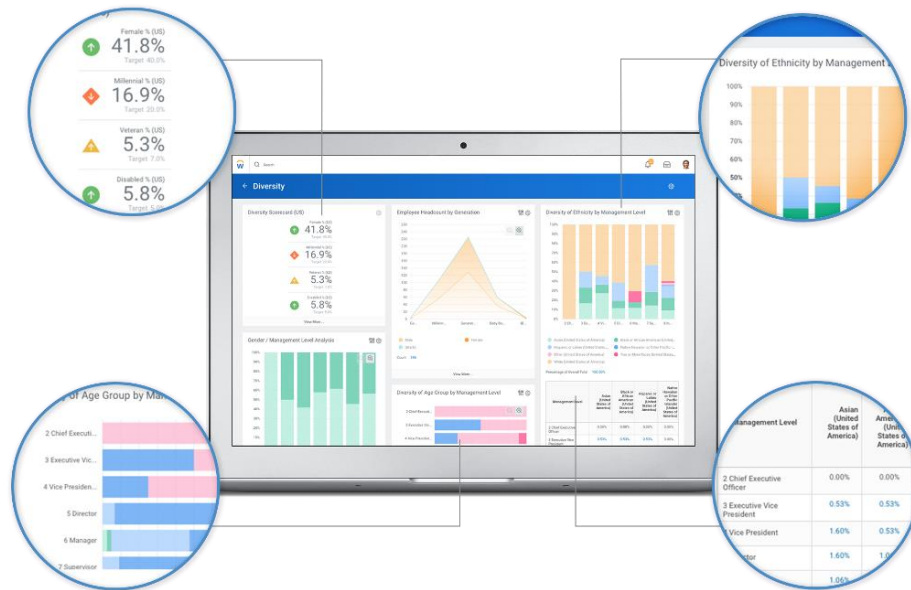
	Time Type	Customer	Worktags	Do Not Bill	Wed, 4/22	Thu, 4/23	Fri, 4/24	Sat, 4/25	Sun, 4/26	Mon, 4/27	Tue, 4/28	
+	<input type="checkbox"/> Covid 19 Response		<input type="checkbox"/> Additional Time Type: Hours Worked	<input type="checkbox"/>	8	8	0	0	0	0	0	
-	<input type="checkbox"/> Vacation			<input type="checkbox"/>	0	0	8	0	0	0	0	
-	<input type="checkbox"/> Sick			<input type="checkbox"/>	0	0	0	0	0	8	0	
-	<input type="checkbox"/> Regular Hours			<input type="checkbox"/>	0	0	0	0	0	0	8	
					8	8	8	0	0	8	8	

# Time Entry & Approval Process

## Timing in Workday



# Workday Reports



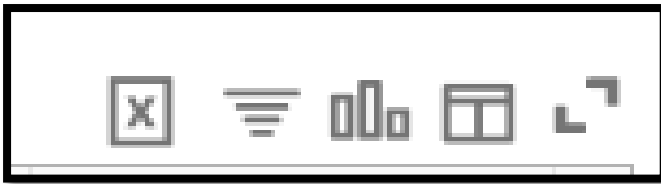
# Getting Started with Workday Reports

- Reports are built directly into Workday
- Reports can be accessed through the Search Bar or through your Notifications, if the report runs on a schedule
- Information in reports is generally limited to your department or team but depends on individual reports and security
- Reports can be exported to Excel or PDF files, as needed
- 2 Reports included in today's training – Activity Codes (name change pending) and Extract Projects

# Report Navigation



From the Header – export to Excel or Print to PDF



Body of the Report

1. Export to Excel – Data w/ Column Headings
2. Filter
3. Chart
4. Column Preferences
5. Toggle Fullscreen Viewing Mode

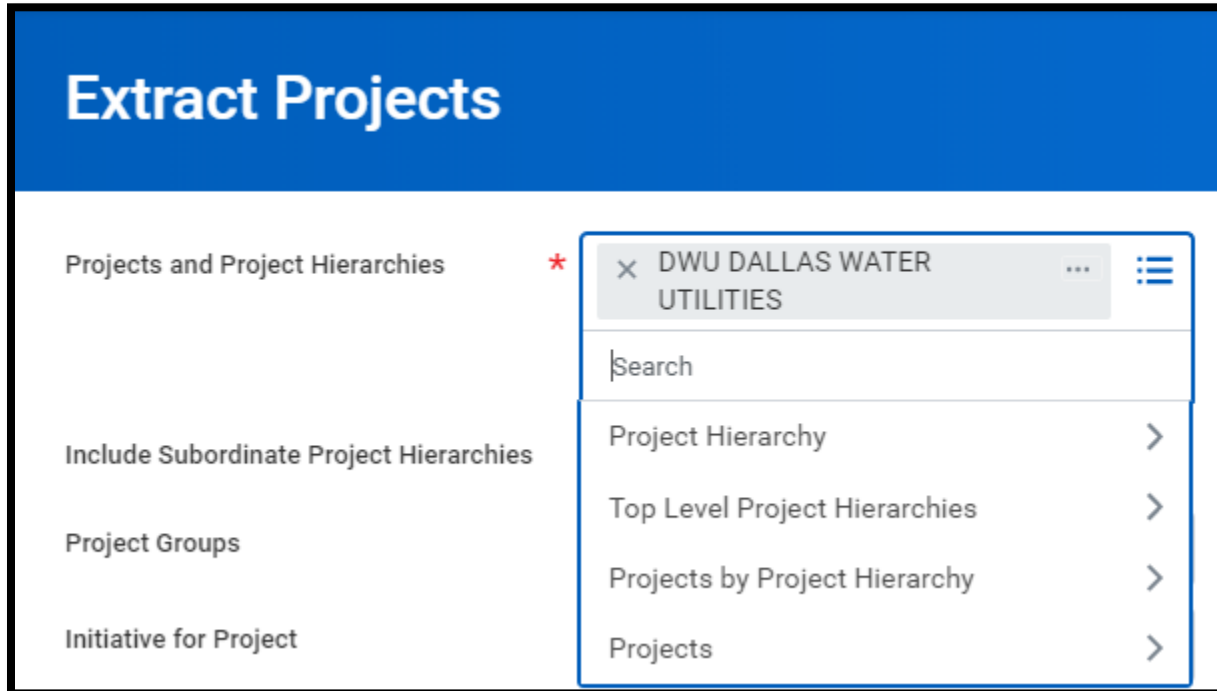


# Extract Projects Report

Use the Extract Projects report to view a list of your department's projects.

Type Extract Projects in the Search Bar

Enter your department's name or a Project's name



**Extract Projects**

Projects and Project Hierarchies \*

Include Subordinate Project Hierarchies

Project Groups

Initiative for Project

Search

DWU DALLAS WATER UTILITIES

Project Hierarchy >

Top Level Project Hierarchies >

Projects by Project Hierarchy >

Projects >

You will only see your department's projects.

# Extract Projects Report

Using the filters, can also use to review dates, find missing project resource Plans.

← Extract Projects







Actions

Projects and Project Hierarchies DWU DALLAS WATER UTILITIES Include Subordinate Project Hierarchies Yes

557 items

Project	Reference ID	Project Start Date	Project End Date	Status of Project Event	Project Owner	Initiative for Project	Project Description	Primary Project H
1218 BRUNNER AVE	DWU-7124-717110	02/16/2018		Approved				DWU DALLAS WA UTILITIES
1401 ELM STREET	DWU-7124-716364	02/03/2017		Approved				DWU DALLAS WA UTILITIES

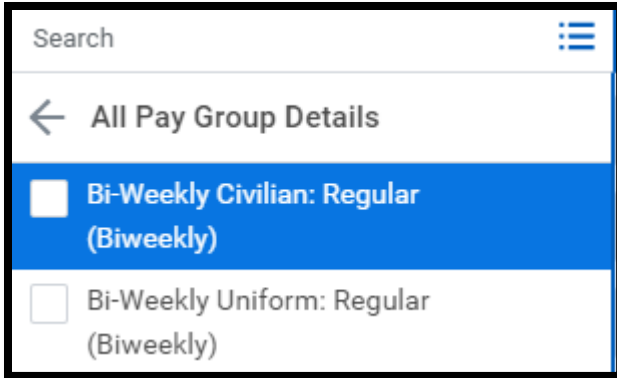
### Activity Codes Report Actions

Pay Run Groups and/or Pay Group Details *	<input type="text"/>	
Periods *	<input type="text"/>	
Project	<input type="text"/>	
Organizations	<input type="text"/>	
Include Subordinate Organizations	<input type="checkbox"/>	
Payroll Off-cycle Type	<input type="text"/>	
Worker	<input type="text"/>	

Enter Activity Codes Report in search bar

Report has multiple options to return data

## Activity Codes Report – Name Change Pending



Search

← All Pay Group Details

☒ Bi-Weekly Civilian: Regular  
(Biweekly)

☐ Bi-Weekly Uniform: Regular  
(Biweekly)

**All Pay Group Details** – select Civilian Regular or Uniform Regular - required

**Periods** – multiple options – may select more than one pay period, as needed

**Projects** – can run report for one or more projects (optional)

**Organizations** – Cost Center or Cost Center Hierarchy (optional)

**Worker** - can select one or more employees

Enter information in one or more prompts for your report



# Projects Manager Next Steps

# Projects Manager Next Steps

- Review your Projects Codes
- Practice Corrections, Adds and Updates in practice tenant 4
- Make updates in production as needed



# Questions, Discussion & Feedback

after class submit questions

[1234@dallascityhall.com](mailto:1234@dallascityhall.com)